VOLUME XVI INDEX

No. 1, March 2003 1-88
No. 2, June 2003 89-162
No. 3, September 2003 163-234
No. 4, December 2003 235-316

A

"Acquiring a Family Firm: A Case Study", 251-268

Adler, Gordon, *Sharing Wisdom, Building Values: Letters from Family Business Owners to Their Successors*, reviewed, 149-150

After-hours work, 38

Agency costs, 98; nonfamily managers and, 96-97

Agency Theory, 5, 97-98; ownership, management separation and, 98-99

Agent Theory, 165

Acquisition strategies, mergers, acquisitions and, 251

Archetypal family business structures, 18

Archetype, defined, 18

Aronoff, Craig E.:*Family Business Ownership: How to Be an Effective Shareholder*, reviewed, 81; *Financing Transitions: Managing Capital and Liquidity in the Family Business*, reviewed, 153-154

Articles: "Acquiring a Family Firm: A Case Study", 251-268; "Conflicting Generations: A New Theory of Family Business Rivalry", 113-124; "Dynamics of Succession in Family Businesses in Western European Countries, The", 269-281; "Educational Needs of Family Businesses: Perceptions of University Directors", 283-291; "Expectation of Partial Retirement Among Family Business Owners, The", 199-210; "Family Angels vs. Other Informal Investors", 163-171; "Family Businesses' Contribution to the U.S. Economy: A Closer Look", 211-219; "Family Businesses Dominate", 235-240; "Management Capabilities and Environmental Characteristics in the Critical Operational Phase of Entrepreneurship-A Comparison of Finnish Family and Nonfamily Firms", 183-197; "Organizational Performance and Conceptual Capability: The Relationship Between Organizational Performance and Successors' Capability in a Family-Owned Firm", 173-182; "Quality Research Guidelines", 109-111; "Succession and Nonsuccess ion Concerns of Family Firms and Agency Relationship with Nonfamily Managers", 89-107; "Succession Planning as Planned Behavior: Some Empirical Results", 1-15; "Succession Transition Process: A Longitudinal Perspective, The", 17-33; "Understanding the Contesting Ideologies of Family Business: Challenge for Leadership and Professional Services", 241-250; "Where Do We Go from Here? Strategic Answers for University-Based Family Business Programs", 125-144; "Women's Role Involvement in Family Businesses, Business Tensions, and Business Success", 53-68; "Work-Family Conflict: A Study of American and Australian Family Businesses", 35-51

Astrachan, Joseph H.:*Conflict and Communication in the Family Business*, reviewed, 292-293; "Family Businesses' Contribution to the U.S. Economy: A Closer Look", 211-219

Australian, American owners, work-family conflict and, 46-47

Australian Family Business Lifestyle Audit (AFBLA), 42-43

B

Barnett, Steve, "Educational Needs of Family Businesses: Perceptions of University Directors", 283-291

Behavior-based conflict, 37

Boch Jr., Ernie, interview with, 69-73

Book reviews: *Conflict and Communication in the Family Business*, 292-293; *Consulting to Family Businesses: A Practice Guide to Contracting, Assessment and Implementation*, 294-295; *Family Business Gathering 2001, The Holistic Model: Destroying Myths and Creating Value in Family Business*, 224-226; *Family*

Business Ownership: How to Be an Effective Shareholder, 81; *Financing Transitions: Managing Capital and Liquidity in the Family Business*, 153-154; *Love, Power and Money: Family Business Between the Generations*, 79-80; *Mommy, Are We Rich? Talking to Kids About Family Money*, 296-298; *Parting Company*, 75-78; *Raising Rich Kids*, 296-298; *Seven Principles for Making Marriage Work, The*, 151-152; *Sharing Wisdom, Building Values: Letters from Family Business Owners to Their Successors*, 149-150; *Silver Spoon Kids: How Successful Parents Raise Responsible Children*, 296-298
Borrowed desire. *See* Theory of Borrowed Desire
Business life cycle, family angels and, 168-169
Buy-outs, 93

C

Chrisman, James J.: "Succession and Nonsuccess ion Concerns of Family Firms and Agency Relationship with Nonfamily Managers", 89-107; "Succession Planning as Planned Behavior: Some Empirical Results", 1-15
Chua, Jess H.: "Succession and Nonsuccess ion Concerns of Family Firms and Agency Relationship with Nonfamily Managers", 89-107; "Succession Planning as Planned Behavior: Some Empirical Results", 1-15
Compensation, 93
Compensation Model, 36
Conflict and Communication in the Family Business, reviewed, 292-293
"Conflicting Generations: A New Theory of Family Business Rivalry", 113-124
Conflicts, 93
Consulting to Family Businesses: A Practice Guide to Contracting, Assessment and Implementation, reviewed, 294-295
Control, 93-94; defined, 54-55
Controlling ownership archetype, 18
Corbetta, Guido, *Sharing Wisdom, Building Values: Letters from Family Business Owners to Their Successors*, reviewed, 149-150
Corporations, 213
Cousins' consortium archetype, 18
Cuneo, Gianfilippo, *Sharing Wisdom, Building Values: Letters from Family Business Owners to Their Successors*, reviewed, 149-150

D

Danes, Sharon M., "Women's Role Involvement in Family Businesses, Business Tensions, and Business Success", 53-68
Dascher, Paul, "Educational Needs of Family Businesses: Perceptions of University Directors", 283-291
Davis, Jane Hilburt and W. Gibb Dyer, Jr., *Consulting to Family Businesses: A Practice Guide to Contracting, Assessment and Implementation*, reviewed, 294-295
Democratic leadership, 93
DeMoss, Michelle, "Educational Needs of Family Businesses: Perceptions of University Directors", 283-291
DeVaney, Sharon A., "Expectation of Partial Retirement Among Family Business Owners, The", 199-210
de Visscher, François M., *Financing Transitions: Managing Capital and Liquidity in the Family Business*, reviewed, 153-154
Double Bind Theory, succession planning and, 118-120
Drucker, Peter, 125
Dyer, Jr., W. Gibb and Jane Hilburt, *Consulting to Family Businesses: A Practice Guide to Contracting, Assessment and Implementation*, reviewed, 294-295
"Dynamics of Succession in Family Businesses in Western European Countries, The", 269-281

E

Economy: family businesses and, 235, 269-270; succession planning and, 1
Edquist, Peg Masterson, *Love, Power and Money: Family Business Between the Generations*, reviewed, 79-80
Education, 289; family businesses and, 283;

family business programs and, 284; literature review on, 285-286; mutual respect and, 290; relationship maintenance and, 290; shared values and, 290-291; willingness to grow, learn and, 290. *See also* University-based family business programs
"Educational Needs of Family Businesses: Perceptions of University Directors", 283-291
Employment, 236-238
Entrepreneurialism, 184, 235, 245
Entrepreneurs, 163-164
Erikson, Truls, "Family Angels vs. Other Informal Investors", 163-171
"Expectation of Partial Retirement Among Family Business Owners, The", 199-210

F

Family angels: business life cycle and, 168-169; defined, 163; exit issues and, 169; future research and, 169-170; investments and, 168; risk and, 169
"Family Angels vs. Other Informal Investors", 163-171
Family businesses: Census Bureau and, 215-216; defined, 270-271; defining, challenge of, 211-213; economy and, 235; Gross Domestic Product and, 216-217; healthy, study analysis and results, 287-288; healthy, study of, 286-287; healthy traits of, 285-286; legal forms of organization and, 213; multiple generations, family managers and, 215; National Federation of Independent Business, 214; numbers of, 235-236; overlapping systems within, 53-54; phases of development, 271-272; principal occupation and, 214-215; quantifying, 213-214; significance of, 183; Small Business Administration and, 216-217; special characteristics of, 270-271; start-up factors, 184; systems of, 269; Theory of Triangulation and, 116-117; total number of in U.S. and, 216; U.S. economy and, 211, 215; women's involvement, tension, conflict and, 56-57; women's role, success and, 57-58. *See also* Archetypal family business structures
"Family Businesses' Contribution to the U.S. Economy: A Closer Look", 211-219
"Family Businesses Dominate", 235-240
Family business failure, 113-114
Family Business Gathering 2001, The Holistic Model: Destroying Myths and Creating Value in Family Business, reviewed, 224-226
Family business issues, 90-96; agency costs and, 98; nonfamily management, need for and, 103-104; nonfamily management studies and, 102-103; nonfamily managers and, 96-97; size and, 100-101; study methodology, 91-92; succession and, 90-91, 101-102; underlying concerns, constructs, 95-96; underlying concerns and, 92-95
Family Business Ownership: How to Be an Effective Shareholder, reviewed, 81
Family cohesion, 39-40, 40, 46
Family Firm Institute (FFI), 284
Family Fundamental Interpersonal Relationship Orientation (FIRO) Model, 54-56
Financing Transitions: Managing Capital and Liquidity in the Family Business, reviewed, 153-154
Forum Model, university-based family business programs, 126-127
Fowler, Dean, *Love, Power and Money: Family Business Between the Generations*, reviewed, 79-80
Friedman, Edwin, 116-117

G

Gallo, Eileen and Jon Gallo, *Silver Spoon Kids: How Successful Parents Raise Responsible Children*, reviewed, 296-298
Generational transition process. *See* Succession transition process
Girard, René, 114-116
GNP, family businesses and, 236
Gottman, John, *Seven Principles for Making Marriage Work, The*, reviewed, 151-152
Gross domestic product, family businesses and, 216-217
Gross National Product, family businesses and, 236

Grote, Jim, "Conflicting Generations: A New Theory of Family Business Rivalry", 113-124

H

Hauser, Barbara, *Mommy, Are We Rich? Talking to Kids About Family Money*, reviewed, 296-298
Holistic Model, 128; university-based family business programs and, 126, 127

I

Ideological triangle, 241-245; contesting, contrasting ideologies and, 246-247; entrepreneurialism, 245; managerialism, 244; paternalism and, 243-244
Imitation (*mimesis*), 114-115
Incompetence, 93
Individual proprietorships, 213
Informal investors, categories of, 163-164
Internal Revenue Service, information on privately held companies and, 213-214
International Family Enterprise Research Academy (IFERA): "Family Businesses Dominate", 235-240; "Quality Research Guidelines", 109-111
Interrole conflict, 38
Interviews: "Interview with Dr. William O'Hara", 221-223; "Interview with Ernie Boch Jr.", 69-73; "Interview with Paul H. Kalemkiarian, Sr.", 145-147
Investment: phases, 165-166; study methodology and, 166-168
Investors, policy makers and, 169

J

Jaffe, Dennis, T., review by, 296-298

K

Kalemkiarian, Sr., Paul H., interview with, 145-147
Karofsky, Paul I.: "Interview with Dr. William O'Hara", 221-223; "Interview with Ernie Boch Jr.", 69-73; "Interview with Paul H. Kalemkiarian, Sr.", 145-147; "Work-Family Conflict: A Study of American and Australian Family Businesses", 35-51
Kenyon-Rouvinez, Denise H., *Sharing Wisdom, Building Values: Letters from Family Business Owners to Their Successors*, reviewed, 149-150
Keyt, Andrew, review by, 151-152
Kim, Haejeong, "Expectation of Partial Retirement Among Family Business Owners, The", 199-210
King, Sandra, "Organizational Performance and Conceptual Capability: The Relationship Between Organizational Performance and Successors' Capability in a Family-Owned Firm", 173-182
Koiranen, Matti, "Understanding the Contesting Ideologies of Family Business: Challenge for Leadership and Professional Services", 241-250
Krasnow, Henry C., review by, 294-295

L

Lansberg, Ivan, theory of mentoring and, 120-122
Lansky, David, review by, 81
Leaders: characteristics of, 174; mental processing and, 174-175; potential capability of, 175
Le Van, Gerald, *Raising Rich Kids*, reviewed, 296-298
Littunen, Hannu, "Management Capabilities and Environmental Characteristics in the Critical Operational Phase of Entrepreneurship-A Comparison of Finnish Family and Nonfamily Firms", 183-197
Love, Power and Money: Family Business Between the Generations, reviewed, 79-80

M

McCann, Greg, Michelle DeMoss, Paul Dascher, and Steve Barnett, "Educational Needs of Family Businesses: Perceptions of University Directors", 283-291
McCann, Greg, "Where Do We Go from

Here? Strategic Answers for University-Based Family Business Programs", 125-144
McCann, Gregg, *Family Business Gathering 2001, The Holistic Model: Destroying Myths and Creating Value in Family Business*, reviewed, 224-226
McMillan, Kristi S. and Joseph H. Astrachan, *Conflict and Communication in the Family Business*, reviewed, 292-293
"Management Capabilities and Environmental Characteristics in the Critical Operational Phase of Entrepreneurship-A Comparison of Finnish Family and Nonfamily Firms", 183-197
Mangerialism, 244
Mentoring, conflict resolution and, 121-122
Mergers and acquisitions (M&As): acquisition strategies and, 251; cultural differences and, 258-259; cultural disparities and, 262-263; family organization and, 260-261; key success factors for, 252-253; motivations for, 251, 257-258, 261-262; post-, success factors and, 263-264; structure of, 257; study methodology on, 253-254; study results, 254-257; success factors for, 259-260
Michaud, Laura, review by, 149-150
Mickelson, Rachel E. and Christopher Worley, "Acquiring a Family Firm: A Case Study", 251-268
Millen, Robert, "Work-Family Conflict: A Study of American and Australian Family Businesses", 35-51
Mommy, Are We Rich? Talking to Kids About Family Money, reviewed, 296-298
Murray, Barbara, "Succession Transition Process: A Longitudinal Perspective, The", 17-33

N

National Federation of Independent Business, 214
Network Theory, 186-187
Neubauer, Herbert, "Dynamics of Succession in Family Businesses in Western European Countries, The", 269-281
Nonfamily managers: agency costs and, 96-97; issues of, 97; literature on, 97

O

O'Hara, Dr. William, interview with, 221-223
Olson, Patricia D., "Women's Role Involvement in Family Businesses, Business Tensions, and Business Success", 53-68
"Organizational Performance and Conceptual Capability: The Relationship Between Organizational Performance and Successors' Capability in a Family-Owned Firm", 173-182

P

Partial retirement: defined, 200-201; expectations for, 201, 207-208; factors affecting decision and, 208-209; hypotheses on, 201-202; new phenomenon of, 200-201; study data, sample and, 202; study sample and, 203-207; study variables and, 202-203
Parting Company, reviewed, 75-78
Partnerships, 213
Paternalism, 243-244
Paul, Joseph, review by, 292-293
Peterfriend, Suzan, *Mommy, Are We Rich? Talking to Kids About Family Money*, reviewed, 296-298
Planned behavior: attitudes, intention and, 2; succession planning and, 2-3
Portfolio Theory, risk parameters and, 164-165
Power structure, interaction, 55-56
Prejudices, 235
Professional advisors, succession planning and, 30
Professionalism, service providers and, 247-248
Pull factors, 186
Push factors, 186

Q

"Quality Research Guidelines", 109-111

R

Raising Rich Kids, reviewed, 296-298
Reitan, Bjørnar, "Family Angels vs. Other Informal Investors", 163-171

Resting phases, 30-31
Retirement, 199-200. *See also* Partial retirement
Risk, 164-165
Rivalries, 114
Rivalry, 93
Romano, Claudio A., "Work-Family Conflict: A Study of American and Australian Family Businesses", 35-51

S

Segmentation Model, 36
Service providers, 247-248
Seven Principles for Making Marriage Work, The, reviewed, 151-152
Shanker, Melissa Carey, "Family Businesses' Contribution to the U.S. Economy: A Closer Look", 211-219
Sharing Wisdom, Building Values: Letters from Family Business Owners to Their Successors, reviewed, 149-150
Sharma, Pramodita, 89-107; "Succession and Nonsuccess ion Concerns of Family Firms and Agency Relationship with Nonfamily Managers", 89-107; "Succession Planning as Planned Behavior; Some Empirical Results", 1-15
Sherman, Andrew J., *Parting Company*, reviewed, 75-78
Shunk, Gary S., review by, 79-80
Sibling partnership archetype, 18
Silver, Nan, Seven Principles for Making Marriage *Work, The*, reviewed, 151-152
Silver Spoon Kids: How Successful Parents Raise Responsible Children, reviewed, 296-298
Small Business Administration, family business and, 216-217
Smyrnois, Kosmas X., "Work-Family Conflict: A Study of American and Australian Family Businesses", 35-51
Social systems, 269
Sorenson, Ritch L., review by, 224-226
Sørheim, Roger, "Family Angels vs. Other Informal Investors", 163-171
Spillover Model, 36
Start-ups: Contingency Theory and, 184; factors affecting, 184; family/nonfamily distinctions, 192; group management styles and, 189-190; local environments and, 187-188, 193; motives for, 186, 190; networks and, 186-187, 189; study data collection and, 188-189; study findings and, 189-192
Strain-based conflict, 37
Strategic planning, university-based family business programs and, 125-126
Stratified Systems Theory, 174
Succession, 89-90, 90-91; barriers to, 274-276; business-related barriers to, 276-277; business successors and, 273; business transfers and, 273; decision-making process for, 279; dynamics, 277-280; empirical findings on, 272-277; family expectations and, 271-272; motives for, 274; personal barriers to, 276; theory of mentoring and, 121-122. *See also* Partial retirement; Transitions
"Succession and Nonsuccess ion Concerns of Family Firms and Agency Relationship with Nonfamily Managers", 89-107
Succession planning, 4-5; Agency Theory and, 5; attitudes about, 2-3; communication and, 10; conceptual model for, 5-6; defined, 1; double bind theory and, 118-120; family commitment and, 4-5; future research and, 12; hypothesis, 4-5; incumbent, departure and, 10; incumbent role and, 11; incumbents desires and, 4; planned behavior and, 2-3; post-succession business strategy and, 9-10; reasons for, 3-4; research on, 1; social norms and, 11; study methodology, 6-7; study results. 7-10; trusted successor and, 5
Succession survival, 173-174; commitment, experience and, 179-180; leadership characteristics and, 174; potential capability and, 175-176, 180-181; sampling design and, 176; study measures and, 177; study methods on, 175-176; study participants and, 176-177; successors potential and, 178-179
Succession transition process: archetypal family business structures and, 18; balanced journey and, 24-27; closure failure, imbalance, disintegration, 24, 27-28; content versus process and, 30; data analysis and, 21-

22; data collection on, 21; exploration stage, 23-24; family enterprise systems and, 20-21; generic succession journey types and, 29-30; inadequate exploration, imbalance, disintegration, 24, 27; professional advisors and, 30; research basis for, 18-20; research method on, 21; resting, trigger-out phases and, 30-31; transition cycle and, 22-23; transition phases and, 28-29
"Succession Transition Process: A Longitudinal Perspective, The", 17-33
"Succession Planning as Planned Behavior: Some Empirical Results", 1-15
Survival, family-owned businesses and, 252

T

Tanewski, George A., "Work-Family Conflict: A Study of American and Australian Family Businesses", 35-51
Tax laws, 238
Theory of Borrowed Desire, 114-116; double bind theory and, 118; family rivalries and, 114; triangular structure and, 115
Theory of mentoring, 120-122; modeling versus, 122; succession and, 121Theory of Triangulation, 116-117; family systems theory and, 117
Thompson, John K., review by, 75-78
Three-circle model, 241-243, 246-247
Time-based conflict, 36-37
Transition phases, 28-29; exploration period, 28-29; exploration skills development, 29; exploration tasks and, 29; transition cycle and, 28
Transitions: generational, 19; resistance and, 19-20. *See also* Successions
Triangulation. *See* Theory of Triangulation
Trigger-out phases, 30-31

U

"Understanding the Contesting Ideologies of Family Business: Challenge for Leadership and Professional Services", 241-250
United States Association of Small Businesses and Entrepreneurs (USASBE), 284
University-based family business programs, 125; clients for, 136-137; experience and, 129-130; Forum Model, 126-127; funding for, 137-140; Holistic Model and, 126, 127, 128; key considerations for, 130; leadership skills needed for, 132-136; location within university and, 130-132; marketability of, 137-138; reasons for, 127-130; services provided by, 136-137; strategic planning and, 125-126. *See also* Education
Upton, Nancy B., *Family Business Gathering 2001, The Holistic Model: Destroying Myths and Creating Value in Family Business*, reviewed, 224-226

V

Venture capital, 163

W

Ward, John L.: *Family Business Ownership: How to Be an Effective Shareholder*, reviewed, 81; *Financing Transitions: Managing Capital and Liquidity in the Family Business*, reviewed, 153-154
"Where Do We Go from Here? Strategic Answers for University-Based Family Business Programs", 125-144
Women's role involvement: constructive versus destructive tension and, 66; decision-making and, 60-62; Family APGAR and, 63, 66; family business, tensions and, 60; family business success and, 57-58; gender dynamic and, 53-54; levels of, 59-60; literature review on, 56-58; study methods on, 58-59; tension, conflict and, 56-57; tension issues and, 65-66; tensions, success and, 62-64; theoretical model and, 54
"Women's Role Involvement in Family Businesses, Business Tensions, and Business Success", 53-68
Work dissatisfaction, 38-39
Work-family conflict, 35-36; after-hours work and, 38; age of owners and, 46-47; anxiety and, 40; Australian Family Business Lifestyle Audit (AFBLA), 42-43; Australian versus

American business owners, 46-47; Compensation Model and, 36-37; empirical work on, 36-37; family cohesion and, 39-40, 40, 45-46; family versus nonfamily firm owners and, 46; hypothetical model of, 37-40; interrole conflict and, 38-40; Segmentation Model, 36; Spillover model and, 36-37; study results, 43-47; work dissatisfaction and, 38-39; work strain and, 40
"Work-Family Conflict: A Study of American and Australian Family Businesses", 35-51
Work strain, 40
Worley, Christopher, "Acquiring a Family Firm: A Case Study", 251-268

Y

Yilmaz, Mustafa R., "Work-Family Conflict: A Study of American and Australian Family Businesses", 35-51